

# Strategic Planning



## **DEVELOPING LEADERS. STRENGTHENING SCHOOLS. CHANGING LIVES.**

Our mission is to change the lives of students in under-resourced communities around the world by developing leaders and teachers who strengthen schools and improve student outcomes.

With deep gratitude to our partners for all we've learned from and with you over the years.

# Introduction: Strategic Planning

We believe that the most effective organizations are also the healthiest – places where people feel purposeful, connected, and valued. In today’s environment, where the volume and velocity of change is unprecedented, organizational health is essential. The ability to be nimble and responsive while staying focused and mission-driven is paramount to survival and ultimate success.

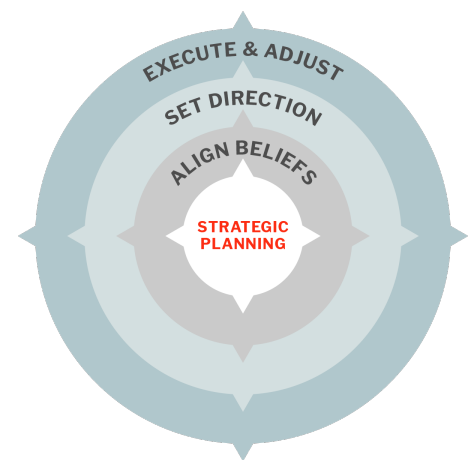
Our Strategic Planning Toolkit can help an organization navigate these changes. We have identified three areas that support each other: align beliefs, set direction, and execute & adjust. We believe all three elements combine to provide the foundation for enduring success.

At the center of these three areas, and fundamental to the success of any organization, sits Strategic Leadership. Above all else, the leaders’ actions will determine how effective the Toolkit is in providing the clarity and confidence organizations need to thrive.

The aim of this Toolkit is to provide a roadmap of the main topics and key questions a leader and her team need to answer to set themselves up for success.

**We see three key elements of Strategic Planning:**

- 1** Align beliefs
- 2** Set Direction
- 3** Execute & Adjust





# Element #1: Align Beliefs

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The first element of our Strategic Planning Toolkit we call “Align Beliefs.” It is here that organizations answer the foundational questions of who, what, when, where, and how — all built on top of their unique why.

We have four categories that help guide a leadership team to achieve the clarity they need: Refining the Possibilities, Agreeing the Essentials, Defining the Enduring Model, and Envisioning a Lasting Impact. By working through the protocols outlined in this toolkit, an organization can create the alignment required to achieve its mission.

## **REFINE THE POSSIBILITIES**

What is our mission, where will we focus, how will we succeed, and what will it take?

## **AGREE THE ESSENTIALS**

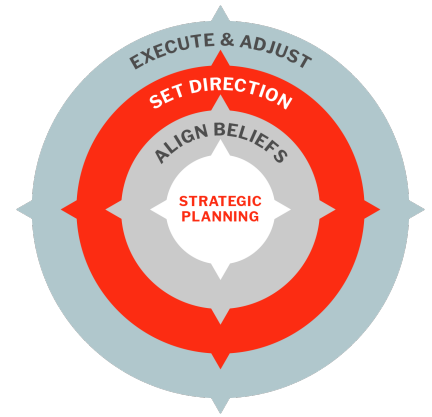
What is our passion, what can we be great at, and what sustains us financially?

## **DEFINE THE ENDURING MODEL**

What are the elements of our flywheel, and how do we create momentum?

## **ENVISION A LASTING IMPACT**

What are our aspirations for long term, systemic change?



# Element #2: Set Direction

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The second element of our Strategic Planning Toolkit we call “Set Direction.” It is here that organizations answer the forward-looking questions of where do we want to be in 3-5 years and what will it take to get there?

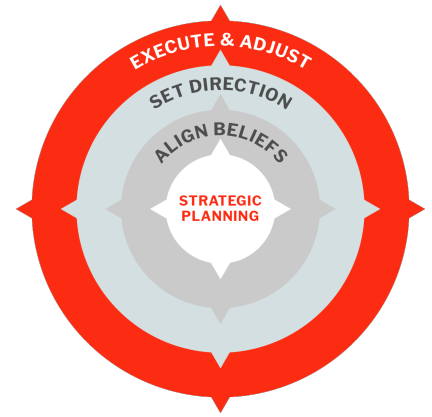
We have four categories that help guide a leadership team to achieve the clarity they need: Identifying Potential Impact, Agreeing Scope of Reach, Operationalizing Objectives, and Planning to Ensure Success. By working through the protocols outlined in this toolkit, an organization can establish the plan needed to achieve its mission.

**IDENTIFYING POTENTIAL IMPACT** What is the landscape of our target market(s)?  
How should we design our programmatic model?

**AGREEING SCOPE OF REACH**  
What is the scale of outreach we aspire to achieve in 3-5 years?

**OPERATIONALIZING OBJECTIVES** What do we have to do to achieve that scale?  
How would our staffing, assets, and funding change?

**PLANNING TO ENSURE SUCCESS**  
What are the potential risks we need to mitigate? How will we do that?



# Element #3: Execute & Adjust

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The third element of our Strategic Planning Toolkit we call “Execute & Adjust.” It is here that organizations answer the critical questions of what are our 6-12 month priorities and how will we monitor our progress and act on that analysis?

We have three categories that help guide a leadership team to achieve the clarity they need: Agreeing Short-Term Priorities, Outlining Systems & Structures, and Monitoring Implementation. By working through the protocols outlined in this toolkit, an organization can create the conditions needed to achieve its mission.

**AGREEING SHORT-TERM PRIORITIES** What are our “Big Rock” goals?  
What do we need to do to be successful in the next 6-12 months?

**ENABLING SYSTEMS & STRUCTURES** How do we map the workflow?  
Who needs to do what by when – quarterly, monthly, weekly?

**MONITORING IMPLEMENTATION**  
How will we monitor progress and ensure we make the necessary adjustments?